



Electronic Procurement Information Collection System (ePICS)

Data Entry Tips

ePICS TIPS

APPLICATION FUNCTIONALITIES

- Required fields are shown in “**RED**” and have an “*” next to them.
- You must click the “**SAVE**” button on each screen to save your data. If you move between tabs without clicking the ‘Save’ button, your data will not be saved.
- Do not use any of the internet browser tools, such as the “**BACK**” button or the “X” to end the session. Use the “**CANCEL**” button inside the ePICS system.
- “**HELP**” is available under various fields. Just move your mouse over the field headings that are underlined and right click to view **Help** screens.
- The “**DELETE**” button only appears on the “Award Information” tab. If clicked, it will delete the entire record.
- The “**LOG OUT**” option is located under the user’s name, in the top left-hand corner of the screen.
- Categories that have Radio Buttons allow only one choice. Categories with Check Boxes allow more than one option to be chosen.
- If the **Phoenix** system is down, a message will appear on all screens, regardless of where you are located in the application.
- **DATA DOES NOT COPY FORWARD** from the Base Award to Modifications. Therefore, when entering a Modification, base award information must be re-keyed. We plan to issue version 2 of this software in the near future which will have this functionality.
- **INDEFINITE DELIVERY VEHICLES (IDV)** is the terminology used by FPDS-NG for what we call IQCs, Requirements, BPAs and Definite Quantity type contracts. We have used it here because once GLAS is up you will be directly linked to the FPDS-NG webs site, where this terminology will be used.
- **INTERFACING WITH PHOENIX** – If you choose to enter the Phoenix Obligation Number under the award tab, it will auto-populate a number of fields under the Vendor Info and Dates and Dollars tabs. This will not only save you time but improve the integrity of the data. If you click on the help text for Phoenix Obligation Document Number field, it will identify the fields that are auto-populated.
- “**PAGE NOT FOUND**” error message is a network related error message that can happen with any application. Users should press PFKEY “F5” to refresh the screen after this message has been received by the user. The user will lose the information previous loaded on that page, but will now be able to resume entering data. This is a fairly rare error.

ePICS TIPS

LOGGING INTO E-PICS

- User Name and password are the same as your network login
- Select your Domain. This is your country location. For example: USUSAID = United States. THUSAID = Thailand USAID. Contact your local administrator if you are not sure of your PC Domain.

GENERATING A REPORT (two options)

1. Print each page by clicking on the “Print” option found in the top left-hand corner of the screen.
2. You may print a summary report of the data with an option to export data into an Excel Spreadsheet. This can be done from the “Welcome” screen drop down. The “Export to Excel” link is available below the data, at the bottom of the page.

SEARCHING FOR AN AWARD RECORD

From the Welcome screen you can search for actions previously entered using any of the fields listed below. The “%” is a wild card and can be used in the following fields to filter the search.

- Date Range
- Award ID (Award Number)
- Validation Status (Errors, Warnings, etc.)
- Process State (Records reported/not reported to FPDS-NG)
- Type of Award (Acquisition/Assistance/IAA)
- Modified By (Name of person who last modified the record)
- Created By (Name of person that originally entered the record)

VALIDATING AN AWARD RECORD

The last tab in the process runs the “Validation” to determine if all the required information for FPDS-NG or FAADs has been entered. There is also Agency Specific required information. After the validation is run, it will display one of the following validation statuses.

- **VALIDATION COMPLETED - No Errors Found**
- **ERRORS:** Corrections must be made before the data will be transmitted. A listing of errors is displayed on the last tab with links to the errors.
- **WARNINGS** are not hard-stops and the system will return a status of “**VALIDATE w/Warnings**” and the action will be transmitted.

From the welcome page you will also see the status for your entries. However, there will be more options listed.

- **RE-RUN Validation:** Required when validations are not completed or when corrections were made and the validation was not run again.
- **NEW:** Initial entry of an action that has been saved to the system but not validated.

ePICS TIPS

ENTERING A NEW ACTION

- **Selecting Type of Award**
 - Acquisition: (all Contract types)
 - Assistance: (Grants & Cooperative Agreements)
 - Interagency Agreements (IAA & 632b)
- **Selecting an Action Type**
 - Base Awards (All procurement types except for IQCs, BPAs, DQC, BOA and GSA/Federal Schedule)
 - Indefinite Delivery Vehicle (IDV)/IDV Orders (IQCs, BPAs, DQC, BOA and GSA/Federal Schedule)
- **Entering Award Information**
 - Base Award: Be sure to include the dash and zeros at the end for the award number or it will return as an error, i.e. 267-C-00-00-00230-00.
 - Indefinite Delivery Vehicles Orders (what we call task or delivery orders): Be sure to enter the order number within the award number, i.e. AOT-I-02-00-00012-00.
 - Modifications: Be sure to enter the modification number at the end of the award number, i.e. SPU-I-00-00-00012-05.
- **Phoenix information:** The following Phoenix information will be auto-populated on the various tabs (where available) if the correct Document type and Obligation number are entered.

○ Vendor Name	DUNS Number
○ Email Address	Phone Number
○ Fax Number	Vendor Address Line 1 & Line 2
○ Zip Code	City
○ State	Obligation Amount
○ Effective Date	
- **Phoenix Obligation Document Number & Phoenix Document Types:**
 - **For Missions: Refer to the MAARD for the Phoenix Obligation Document Number**
 - **Available Document codes:** (You might need to check with your controllers)
 - Uni Obligation
 - Unilateral Obligation Contracts
 - Upward Adjustment
 - Bil Sub-Oblig
 - **For USAID/Washington:** The NMS award number is the obligation number in Phoenix.
 - **Applicable Document codes:**
 - Interfaced Acquisitions Delivery Order; (IQCs Task Orders)
 - Interfaced Acquisitions Purchase Order (All other acquisition types)
 - A&A Assistance Obligation (Assistance Types)

ePICS TIPS

- **Entering Award Officials** – Enter the agency’s e-mail address for each individual or use the look-up feature. After you save it, the individuals name and organization will be auto-populated.
- **DUNS Number** - All vendors doing business with the Federal Government must have a DUNS number. However, in addition to “vendor DUNS numbers” there are also Generic DUNS numbers that can be used under “specific” circumstances. Refer to the following website for additional information: <http://inside.usaid.gov/M/OAA/SolutionsCenter/other/duns.html>.
- **AMOUNTS**
 - **Obligate/de-obligated Amounts:** Enter the net amount of funds (in U.S. dollars and cents) obligated or de-obligated by this transaction. If the net amount is zero, enter zero. If the net amount is a de-obligation, enter a minus sign in addition to the net amount.
 - **Base and Exercised Options Value:** The base plus any options that have been exercised to date.
 - **Base and All Options Value:** The base plus all possible options that could be exercised for the life of the award.
- **Indefinite Delivery Vehicle (IDV) Basic & Order:** An Indefinite Delivery Vehicle (IDV) is any “base award” ordering-type instrument. The IDV category includes, but is not limited to, IQCs, Requirements, BPAs and Definite Quantity Contracts.
 - Government Wide Acquisition Contract (GWAC);
 - Basic Ordering Agreement (BOA);
 - Basic Purchasing Agreement (BPA);
 - Task/Delivery Orders: A Delivery/ Task Order is a order for supplies placed against an established USAID contract or with another Government sources.

ePICS TIPS

- **PRODUCT SERVICE CODES:** Report the four-character code that identifies the research and development, services, or supplies and equipment. If more than one code applies, report the code that represents the predominance of the dollars obligated or de-obligated for the contract/action. (see attached listing of generally used numbers). A look-up field is also available:
 - **For research and development** – These codes begin with the letter “A”.
 - **For services other than research and development** – These codes begin with any other letter other than “A”.
 - **For supplies and equipment** – Use the numeric codes
 - **For construction** – These codes begin with “Y” or “Z”

AB90	R&D-OTHER SVC & DEVELOP
B599	OTHER SPECIAL STUDY & ANALYSES
C111	BLDGS & FAC / ADMIN & SVC BLDGS
C118	BLDGS & FAC / R&D FACILITIES
C119	BLDGS & FAC / OTHER BUILDINGS
D301	ADP FACILITY MANAGEMENT
D302	ADP SYSTEMS DEVELOP
D303	ADP SVCS/DATA ENTRY
D304	ADP SVCS/TELECOMM & TRANSMISSION
D305	ADP TELEPROCESSING & TIMESHARE
D306	ADP SYSTEM ANALYSIS
D307	AUTOMATED INFORMATION SYSTEM SVCS
D308	ADP PROGRAMMING SVCS
D309	ADP INF, BROADCAST & DIST SVCS
D310	ADP BACKUP & SECURITY SVCS
D311	ADP DATA CONVERSION SVCS
D312	ADP OPTICAL SCANNING SVCS
D313	COMPUTER AIDED DESGN/MFG SVCS
D314	ADP ACQUISITION SUP SVCS
D399	OTHER ADP & TELECOMMUNICATIONS SVCS. (INCL. DATA STORAGE)
F999	OTHER ENVIR SVC/STUD/SUP
H199	QUALITY CONT SV/MISC EQ
H999	MISC TEST & INSPECT SVC
L069	TECH REP SVCS/TRAINING AIDS-DEVICES
L070	TECH REP SVCS/ADP EQ & SUPPLIES
L075	TECH REP SVCS/OFFICE SUPPLIES
L099	TECH REP SVCS /MISC EQ
Q999	OTHER MEDICAL SVCS
R119	BLDGS & FAC / OTHER BUILDINGS
R219	OTHER ARCHITECTS & ENGIN GEN
R301	ADP FACILITY MANAGEMENT
R305	ADP TELEPROCESSING SVCS
R306	ADP SYSTEM ANALYSIS
R307	AUTOMATED INFORMATION SYSTEM SVCS

R399	OTHER ADP SVCS
R401	PERSONAL CARE SERVICES
R419	PROF SVCS/EDUCATIONAL SERVICES
R421	PROF SVCS/TECHNICAL ASSISTANCE
R497	PERSONAL SERVICES CONTRACTS
R498	PATENT AND TRADEMARK SERVICES
R499	OTHR PROFESSIONAL SVCS
R506	STUDY/DATA - OTHER THAN SCIENTIFIC
R599	OTHER SPECIAL STUDY & ANALYSES
R610	PERSONAL PROPERTY MANAGEMENT SERVICE
R699	OTHER ADMINISTRATIVE SUPPORT SVCS
R701	MGT SVCS/ADVERTISING
R702	MGT SVCS/DATA COLLECTION
R703	ACCOUNTING SERVICES
R704	MGT SVCS/AUDITING SERVICES
R706	MGT SVCS/LOGISTICS SUPPORT
R707	MGT SVCS/CONTRACT & PROCUREMENT SUP
R710	FINANCIAL SERVICES
S206	GUARD SVCS
U099	OTHER ED & TRNG SVCS
V002	MOTOR POOL OPERATIONS
Y111	CONSTRUCT/OFFICE BUILDINGS
Y199	CONSTRUCT/MISC BLDGS

ePICS TIPS

- **North American Industry Classification System (NAICS)** Report the 6-digit code that best identifies the product or service acquired and represents the predominance of the dollars obligated or de-obligated for the contract/action. The Product or Service Code (PSC) must correlate to the selected NAICS. (see attached listing of generally used numbers). The ‘Look-up’ is available for this field. Construction codes beginning with “23”.

MOST FREQUENTLY USED NAICS CODES

DESCRIPTION	NAIC CODES
1. Administrative management & general management consulting service	541611
2. All other business support services	561499
3. All other information services	514199
4. All other personal services	812990
5. All other professional & technical services	541990
6. All other support services	561990
7. All other travel arrangement & reservation services	561599
8. Architectural services	541310
9. Commodity contracts dealing	523130
10. Computer & office machine repair & maintenance	811212
11. Computer management facilities	541513
12. Computer systems design services	541512
13. Computer training	611420
14. Couriers	492110
15. Custom computer programming services	541511
16. Data processing services	514210
17. Document preparation services	561410
18. Educational support services	611710
19. Emergency & other relief services	624230
20. Engineering services	541330
21. Environmental consulting services	541620
22. Facilities support services	561210
23. Fitness & recreational sports centers	713940
24. Foodservice contractors	722310
25. Freight transportation arrangement	488510
26. General warehousing & storage	493110
27. Graphic design services	541430
28. Highway & street construction	234110
29. Janitorial services	561720
30. Language schools	611630
31. Motor vehicle supplies & new parts whsle	421120
32. Multifamily housing construction	233220
33. New car dealers	441110
34. Office administrative services	561110
35. On-line information services	541519
37. Other management consulting services	541618
38. Other scientific & technical consulting services	541690
39. Other telecommunications	513390
40. Remediation services	562910
41. Satellite telecommunications	513340
42. Security guards & patrol services	233210
44. Temporary help services	561230